



Installation Guide

2010 - 2011

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Getting Started

Thank you for purchasing a PTP Software product. We have provided this Installation Guide to help you get started. Please read the section(s) relevant to the product(s) that you have purchased thoroughly before you start the installation process.

PTP software is provided via a downloadable installation file (or on a CD by request*). Once the installation file has been found and initiated the instructions are identical. Please read the installation notes prior to commencing the installation to ensure you are comfortable with the routine.

A full manual for each of the programs (excluding the PTP Spreadsheet Planners and PTP Professional Tax Archive) is available on screen (by pressing the F1 key when in the program). It is possible to print sections of the on screen help if you prefer a hard copy.

System requirements

Before installing PTP Software, please ensure that the systems you are using meet or exceed the minimum platform, hardware and software requirements described below.

Supported Platforms

IRIS supports PTP Software on the following platforms:

Area	Platform
Standalone, Client or P2P Server	32-bit or 64-bit versions of: Windows XP: Professional Edition (Service Pack 3) Windows Vista: Business, Ultimate or Enterprise Edition (Service Pack 2) Windows 7: Professional, Ultimate or Enterprise Edition
Server	32-bit or 64-bit versions of: Windows Server 2003: Standard, Enterprise, or Datacenter Edition (Service Pack 2) Windows Server 2008: Standard, Enterprise, or Datacenter Edition Windows Server 2008 R2: Foundation, Standard, Enterprise, or Datacenter Edition Via Citrix, Terminal Services or Remote Desktop Connection on any of the above operating systems

All products have been accredited by Microsoft for the 'Works with Windows Vista' programme unless otherwise stated in the program specific requirements below.

Microsoft Windows Support

Due to continuing advancements in Microsoft Windows technology we no longer support Microsoft Windows 95, 98 ME or NT operating systems.

Microsoft is discontinuing their support for Windows 2000 from July 2010 and therefore no testing will be carried out in this environment for our 2010 products.

* A £10 admin fee will be charged for the CD production

Hardware Requirements

Although it may function adequately on some lower specified machines, PTP Software requires the following hardware to run effectively:

Area	Standalone or Networked Client	Networked P2P	Networked Dedicated Server
Processor Type	Intel Pentium/Core 2 family or higher or compatible processor		
Processor Speed	1.8 GHz	1.8 GHz	2 GHz
Memory	1GB	2GB	2GB
Hard Disk Space	5GB or more	5GB or more	10GB or more
Screen Resolution	1024 x 768		
Optical Drive	CD ROM or DVD drive (PTP Software is made available via web download however it can be shipped on a CD by request)		
Network	N/A	Bandwidth: 100Mbs Latency: <5 ms	
Internet	Certain features of PTP Software (notably Filing by Internet to HMRC) and online technical support assistance require a broadband internet connection		

The performance of Celeron and AMD equivalent based systems degrade quicker than standard Pentium and AMD equivalent processors, and may require a shorter renewal cycle.

NOTE: Actual requirements will vary based on your system configuration and the applications and features you choose to install.

Choosing appropriate hardware for a PTP Software installation depends on many factors, including the following:

- Number of clients to process
- Number of concurrent users
- Number of remote connections
- Number of locations

Program specific requirements

Area	Requirement
PTP Spreadsheet Planners - including PTP Tax Credits, PTP Incorporation and PTP Dividend v Salary Planner	Microsoft Excel 2000 or above
The Professional Office	We are pleased to confirm that although it does not have Microsoft accreditation, our Practice Management Software has been tested and works on Microsoft Windows Vista and Windows 7.
PC Share Register Plus and Forms Online	We are pleased to confirm that although it does not have Microsoft accreditation, our Company Secretarial Software has been tested and works on Microsoft Windows Vista and Windows 7.
PTP Company Car Planner	Microsoft Excel 2000 or above
PTP CGT Planner	Microsoft Excel 2000 or above
PTP IHT Planner	Microsoft Excel 2000 or above
PTP Tax Data	Is not compatible with Microsoft Windows Vista or Windows 7
PTP Tax Fast	Is not compatible with Microsoft Windows Vista or Windows 7
PTP Professional Tax Archive	Version 6 or above of Microsoft Internet Explorer or version 7 of Netscape

Anti virus software and firewall protection

Some anti virus software or firewall protection may prevent successful installations of software. In some cases the anti virus or firewall software may need to be disabled while the installation is run. If you require assistance with this please contact your anti virus or firewall software supplier.

For further assistance please email our support team support@ptpsoftware.co.uk

Licencing

Our licence agreements are 'per location'. Multi user/network licences can therefore only be used in one place (i.e. in one office). Similarly, an unrestricted, stand alone or single use licence means that the software can only be used on one machine (unrestricted means 9,999 clients). Software installed on a Terminal Server configuration (including Citrix) is bound by the same licence. If the software is actually used in more than one location a licence for each is required. Following the purchase of software, registration documents will be issued. These documents should be retained. An administration charge may be incurred for reproduction of these documents.

Customer Services Communications Policy

The PTP customer support team will:

- Add common queries to the FAQ list on our website as soon as practically possible
- Notify customers by email and by announcement on the website, anything that is considered to have a major effect on customers including updates to the software
- Provide general information and useful guidance periodically via email newswires

While we will notify you of major updates, we recommend that you visit our website or use the "connect to web and check for updates" facility within the programs (accessed via the spanner icon) regularly to ensure you have the latest release of the programs that you use.

Networking

If you intend to install the software on a network, you will need to be familiar with the way your network shares files. If you are not familiar with the network please contact the person responsible for its operation before proceeding with the installation.

Removing software

- You MUST (where possible) use Add/Remove programs via the Microsoft Windows Control Panel
- DO NOT simply delete program files

Backing up

- It is important to take regular backups of your data
- We strongly recommend that you take a backup of your existing data before installing new versions of the programs

Support

- All technical support is included in the cost of the software
- Our support lines are open Monday to Friday 9:00am to 5:00pm
- Support can be contacted by



0844 815 5530, option 2



support@ptpsoftware.co.uk

Where we are unable to take inbound calls immediately we have a voicemail system and will return all calls in chronological order of receipt.

PTP Platform - incorporating PTP Tax, PTP Partnership and PTP Trust Return, PTP Accounts and PTP CT Platform

The PTP Platform suite consists of:

- PTP Tax Return
- PTP Partnership Return
- PTP Trust Return
- PTP Accounts
- PTP CT Platform

Please note: You do not need to have purchased all five programs as each will run independently of the others.

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**PTP Platform**” link on the Software Downloads webpage
- Select the “**PTP Platform Installation**” link and follow the installation wizard
- After the installation open the program(s) and enter your registration details
- Existing users of PTP Tax, PTP Partnership or PTP Trust transfer forward your existing clients' return data

Detailed guide

Please note the installation will differ depending on whether any PTP Platform products have been installed on the workstation before. The following notes have therefore been split into All Users, Existing PTP Platform users and New PTP Platform users as appropriate.



Important note: You must have administrative access rights to install the PTP Platform suite. If you do not have the necessary access rights you will need to seek assistance from your own IT support.

All Users

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

PTP Platform programs are supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **PTP Platform** consisting of PTP Tax Return, PTP Partnership Return, PTP Trust Return, PTP Accounts and PTP CT Platform. Then select the “**PTP Platform Installation**” link.

The PTP Platform installation installs all five of the PTP Platform products, it therefore installs programs that share information and databases with each other. Because of this, the installation differs depending on whether any PTP Platform programs are already installed on the machine (including previous years).

Please note: As well as installing the current PTP Tax Platform - Tax, Partnership and Trust, the installation also includes a demonstration copy of the previous year programs.

Existing PTP Platform users (machines with any PTP Platform products installed)

During the installation you will not be asked to select the destination folder to install the program and databases. These will be installed into the same holding directory as the existing PTP Platform installation. The default installation will install PTP Tax, PTP Partnership, and PTP Trust Return and PTP CT Platform for the current year, PTP Accounts and the previous year PTP Tax Platform software. The default installation will install a demonstration copy of the current year programs you have not purchased.

After installation, the first time you open the PTP Platform programs they will automatically recognise that new software has been loaded onto your system and install it. You will only need to install from the download on one workstation in a network, the new software will then automatically update each workstation as the user runs the PTP Platform programs. After installing, please register your software from one workstation.

Please note: Each user in a network installation must have administrative access rights on the machine for the installation to complete successfully.

Registration

To start any of the PTP Platform products click Start, All Programs, PTP Software and select the product name from the list (alternatively you could use the desktop shortcuts). Click the Spanner icon in the main toolbar, select the Registration tab and enter the details from your registration document(s).



Important note: All PTP Platform products are registered separately so the registration process needs to be performed for each product purchased. (PTP Tax, PTP Partnership and PTP Trust are contained within the PTP Tax Platform so are all registered together). It is important that you keep the registration document.

Transferring earlier year's return data

Once you have successfully installed and registered the program, you must transfer forward your existing (2008/2009) client data. To do this, click the Transfer Clients from a Previous Tax Year button. A message box asking if you have taken a backup will be displayed. It is important to take a backup at this stage. Please ensure that you have done so before you continue. When you confirm you have taken a backup, a screen allowing you to select the 2009 programs that you used will be displayed. You can simply tick the program(s) and click the Transfer button.



Important note: If you are a PTP Partnership Return user that does not use PTP Tax Return, you must transfer the PTP Tax Return data as well as the Partnership Return data as it is this that holds the individual partners' details.

New PTP Platform users (machines that DO NOT have any PTP Platform products installed)

The Installation Wizard will ask you for the destination folder in which to install the program and then a database folder for the database files. We strongly recommend that you install to the default location. If you are installing the network level software please see the notes below. The default installation will install PTP Tax, PTP Partnership and PTP Trust Return and PTP CT Platform for the current year as well as PTP Accounts and the previous year PTP Tax Platform software. The default installation will install a demonstration copy of the current year programs you have not purchased.

Please note: Depending on what files your system already contains, Microsoft Windows may require you to re-boot. Once the installation is complete please register your software from one workstation. See registration instructions above.

Installing on a network - Machines that DO NOT have any PTP Platform products installed (existing PTP Platform users see above)

Quick guide

- The program needs to be installed on each workstation
- The database files need to be installed to a shared area on the server
- The program needs to be registered on one workstation

Detailed guide

PTP Platform programs work on both Peer to Peer and dedicated file server networks. Whatever system is in use all users must have permanent **READ** and **WRITE** access to the folder that will contain the data files. When running the Installation Wizard, you will be asked for the destination folder in which to install the program(s). We recommend that this be left as the default as the program(s) should be on the local drive of each workstation.

You will then be asked for the path to the database folder for the database files. Enter the path to the folder on the server where you wish the database files to be located. **If you use any other PTP Platform products this should be the same location that they use for the data as it will add fields to the existing platform.mdb database.** We would recommend **F:\PTPData** where F is the drive letter assigned to the server.

If you are running a Peer to Peer network you will need to map a drive letter (F in our example) to **\\Example\C\Program Files\PTP** (assuming the database files have been installed to the default location on the acting server)*. Here, **Example** is the name of the computer on the network acting as a server. The path to the database folder from the client workstations would then be **F:\PTPData**.

The path to the database folder must always end in PTPData as the installation adds the necessary subfolder(s) to this, and it is here that the database files are installed. The program requires a particular directory structure. Once installed it is important that you do not change the default structure.

You will need to install the program on each workstation within a network system, however you only need to register the software from one workstation. When the products have been successfully installed and registered you can perform a 'transfer earlier year's return data' as appropriate. This need only be done from one machine (see notes above).

***Microsoft Windows VISTA and Windows 7: Please note:** when installing the PTP Platform Suite on to a Vista or Windows 7 machine or peer to peer network (where the server is a Vista or Windows 7 machine) the default program and data locations will be C:\PTP as the program location and C:\PTP\PTPDATA as the data location. This is down to Microsoft's Virtualisation system and increased security surrounding "**Program Files**".

PTP Tax Expense

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**PTP Tax Expense**” link on the Software Downloads webpage
- Select the “**PTP Tax Expense Installation**” link and follow the installation wizard
- After the installation open the program and enter your registration details
- Existing users transfer forward standing data

Detailed guide

Please note: The installation will differ depending on whether PTP Tax Expense has been installed on the workstation before. The following notes have therefore been split into All Users, Existing PTP Tax Expense users and New PTP Tax Expense users as appropriate.



Important note: You must have administrative access rights to install PTP Tax Expense. If you do not have the necessary access rights you will need to seek assistance from your own IT support.

All users

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

PTP Tax Expense is supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **PTP Tax Expense**. Then select the “**PTP Tax Expense Installation**” link.

New PTP Tax Expense users

The Installation Wizard guides you through the process to make it as easy as possible, there are however some points to note. The Installation Wizard will ask you for the destination folder in which to install the program and then a database folder for the database files. We strongly recommend that you install both of these to the default location. (If you are installing the network level software please see the notes below).

Please note: Depending on which files your system already contains, Microsoft Windows may require you to re-boot.

After installing, Please register your software from one workstation.

Existing PTP Tax Expense users

Following on from the All users section above, The new software will install in the same way as the previous updates/service packs. After installing, you **MUST** open PTP Tax Expense, this will update the system. You will only need to install the software on one workstation in a network and the new software will then automatically update each workstation as the user runs PTP Tax Expense. After installing, please register your software from one workstation.

Please note: Each user in a network installation must have administrative access rights on the machine for the installation to complete successfully.

Registration

To start PTP Tax Expense click **Start, All Programs, PTP Software, and PTP Tax Expense** (alternatively you could use the desktop shortcut). If you are a new user a trial version window will be displayed, click **Register Now** and enter the details from your Registration Document. If you are an existing user click the Spanner Icon, select the registration tab and enter the details from your Registration Document.



Important note: It is important that you keep the registration document.

Transferring earlier year's data

Once you have successfully installed and registered your program, you can transfer forward your earlier year's data. To do this, click the **Spanner** icon in the main toolbar, this will display a Roll Over Data to 2009/2010 window. This option will roll over data for **ALL** companies and therefore need only be run once.

Installing on a network: New user (Existing users see above)

Quick guide

- The program needs to be installed on each workstation
- The database files need to be installed to a shared area on the server
- The program needs to be registered on one workstation

Detailed guide

PTP Tax Expense works on both Peer to Peer and dedicated file server networks. Whatever system is in use all users must have permanent **READ** and **WRITE** access to the folder that will contain the data files. When running the Installation Wizard, you will be asked for the destination folder in which to install the program. We recommend that this be left as the default as the program should be on the local drive of each workstation.

You will then be asked for the path to the database folder for the database files. Enter the path to the folder on the server where you wish the database files to be located. We would recommend **F:\PTPData** where F is the drive letter assigned to the server.

If you are running a Peer to Peer network you will need to map a drive letter (F in our example) to **\\Example\C\Program Files\PTP** (assuming the database files have been installed to the default location on the acting server)*. Here, **Example** is the name of the computer on the network acting as a server. The path to the database folder from the client workstations would then be **F:\PTPData**.

The path to the database folder must always end in PTPData as the installation adds the necessary subfolder(s) to this, and it is here that the database files are installed. Once the program has been installed on the master machine, you must follow the instructions in the registration section above.

You will need to install the program on each workstation within a network system however you only need to register the software from one workstation.

***Microsoft Windows VISTA and Windows 7: Please note:** when installing the PTP Tax Expense on to a Vista or Windows 7 machine or peer to peer network (where the server is a Vista or Windows 7 machine) the default program and data locations will be C:\PTP as the program location and C:\PTP\PTPDATA as the data location. This is down to Microsoft's Virtualisation system and increased security surrounding "**Program Files**".

PC Share Register Plus

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**PC Share Register Plus**” link on the Software Downloads webpage
- Select the “**PC Share Register Installation**” link and follow the installation wizard
- After the installation open the PC Share Register Plus program and enter your registration details

Detailed guide

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

PC Share Register Plus is supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **PC Share Register Plus**, and then select the “**PC Share Register Installation**” link. You can then follow the on screen Installation Wizard.

The Installation Wizard will ask you to specify the type of installation you require. If you are installing for the first time or as an update, select **Complete/Update**. The Wizard will then guide you through the rest of the installation process.

Registration

To start PC Share Register Plus, click Start, All Programs, PC Share Register Plus, and PC Share Register Plus. To licence your software, click on File and Subscription Details and enter the information EXACTLY as shown on the Licence Details document. Click OK and exit and re-start the program.



Important note: It is important that you keep the registration document.

Installing on a network

Quick guide

- The program needs to be installed on the server
- The installation needs to be run on each workstation selecting Network Workstation as the installation type
- The program needs to be registered on one workstation

Detailed guide

PC Share Register Plus is a server-based application. You must therefore install PC Share Register Plus on a network server in the same way as you would on a standalone system. You can then run the installation on each workstation and select the Network Workstation option when asked to select the installation type. This will create a shortcut on the local workstation.



Important note: PC Share Register Plus requires a network drive to be mapped. It will not be possible to run the program over a network without a mapped network drive letter. If you are in any doubt please contact your network administrator.

Please note: If your network is slow (e.g. Wide Area Network) you may wish to install the programs on the local hard disk and access only the data over the network - in this case, do not manually create shortcuts on the workstation, but, for each workstation, run the installer and specify a local folder for the programs and specify the mapped network folder where the data is located.

The Professional Office (TPO)

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**The Professional Office (TPO)**” link on the Software Downloads webpage
- Select the “**TPO Installation**” link and follow the installation wizard
- Choose the Network Status as appropriate
- After the installation, close the Deployment Wizard by clicking Finish, then open the TPO program and run the Initial Setup Wizard
- At the end of your 30 day free trial, enter your licence details via the Licence Key Entry program

Detailed guide

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

TPO is supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **The Professional Office (TPO)**, and then select the “**TPO Installation**” link. You can then follow the on screen Installation Wizard.

Please note: If installing on Microsoft Windows Vista or Windows 7, the installation will cause a User Account Control (UAC) message to be displayed seeking permission to run the installation.

The TPO Deployment Wizard will guide you through the process to make it as easy as possible, there are however some points to note.

The installation routine is split into two constituent parts:

- Selection of the network installation type and the necessary preparation
- The installation of the program itself

The Deployment Wizard will ask you to choose a network status. There are three options:

Option 1 - stand alone installation

If you are installing TPO for use only on one workstation with the data stored locally then select option 1. This option should also be used when installing additional workstations on a network (following an installation using option 2 on the master machine).

Option 2 - network installation

If you are installing TPO databases to a file server, or a computer that several people connect to in order to access the TPO databases then select option 2.

Option 3 - workstation upgrade installation

This option is for upgrading existing network workstation installations only and should not be used for new installations.

If you select option 1 you will be taken directly to an 'install application' screen. Select The Professional Office - Including Task Tracker and click Next. This will start The Professional Office - Setup Wizard (see below). If you selected option 2 see Installing on a network below.

The Professional Office Setup Wizard

During the installation you will be asked for the location in which the program is to be installed. We strongly recommend that you install to the default location.

The Setup Wizard will then ask you to choose a Setup Type:

Standalone user or Network Administrator

This is the default installation and should be used for stand alone installations and for network users that need the administrative programs. It includes all the core program files, system administration programs, mailing wizard templates and database files. This installation must be run on at least one workstation in a network environment.

Standard network user

This should be used on all the other machines on the network. It installs the main program files without the administrative programs.

Custom

This option is used if you would like to look at a demo database as an alternative to the free 30 day trial.

Please note: If you choose this option and then decide to purchase TPO you will not be able to retain the data you have input.

After the Installation, close the Deployment Wizard by clicking Finish.

Please note: Depending on which files your system already contains, Microsoft Windows may require you to re-boot.

To start the TPO program click Start, All Programs, PTP Software, The Professional Office and The Professional Office. You will then be asked to 'locate database files'. If you have installed to the default location you can simply click OK and continue to run the Initial Setup Wizard. If you are installing on a network (see below).

Registration

To enter your registration details, open the Licence Key Entry program by clicking Start, All Programs, PTP Software, The Professional Office, System Administration and Licence Key Entry. Then enter the details from your Registration Document EXACTLY as shown.



Important note: It is important that you keep the registration document.

Installing on a network

Quick guide

- The program needs to be installed on each workstation
- The database files need to be installed to a shared area on the server
- The program on each workstation needs to be told to look for the data on the server
- At the end of your 30 day free trial, enter your Licence details via the Licence Key Entry program on one workstation

Detailed guide

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

TPO works on both Peer to Peer and dedicated file server networks. Whatever system is in use all users must have permanent READ and WRITE access to the folder containing the data files.

Please note that if installing on Microsoft Windows Vista or Windows 7, the installation will cause a User Account Control (UAC) message to be displayed seeking permission to run the installation.

The Deployment Wizard will ask you to choose a network status. There are three options see above. On the first workstation you should select option 2. This will take you to a 'Locate Data Files' page where you enter or browse for a data location. We strongly recommend that data is not stored within the Program Files directory structure. Instead, we would advise that it is stored in a dedicated Data folder within a shared documents folder to protect it from virtualisation under Microsoft Windows Vista and Windows 7. For example:

Windows 2000/XP shared data location would be C:\Documents and Settings\All Users\Shared Documents\PTP\TPOS\Data

Windows Vista shared data location would be C:\Users\Public\Public Documents\PTP\TPOS\Data

If you are running a dedicated server then using the above paths you will need to map a drive letter e.g F:\PTP\TPOS\Data where F is the drive letter assigned to the server.

If you are running a Peer to Peer network you will need to map a drive letter (F in our example) to the designated shared area on the acting server e.g. \\Example\C\Documents and Settings\All Users\Shared Documents\PTP\TPOS (for Windows 2000/XP) or \\Example\C\Users\Public\Public Documents\PTP\TPOS (for Windows Vista). Here, Example is the name of the computer on the network acting as a server. The path to the database folder from the client workstations would then be F:\Data.

The path to the database folder should always end in Data. When you have selected the path for the data, Clicking Next will take you to a 'Preparing disk images' page where you can choose to copy installation disk images to a commonly accessible network location. This will allow you to browse the network for the setup files rather than taking the CD to each workstation. Clicking Next will then take you to a Preparing Data for Use screen for you to copy the databases and installation files to your chosen location.

Once the data files and installation files have been copied clicking next will start The Professional Office Setup Wizard (see above)

For this first installation, the Stand Alone user or Network Administrator option should be run. To complete the initial installation, start the TPO program by clicking Start, All Programs, PTP Software, The Professional

Office and The Professional Office. You will then be asked to 'locate database files'. Use the browse feature to locate the data directory F:\Data in our example and click OK.

You must run the Initial Setup Wizard before installing on any additional workstations. This will allow simple connection to the shared data. Once the Initial Setup Wizard has been run on the first machine the installation needs to be run on each additional workstation within a network system. To install on subsequent workstations you can either choose to install option 1 from the CD or browse the network to run the installation disk images setup file. F:\Data\Update\DiskImage\TPAO\Disk1\Setup.exe (in our example)

To complete the workstation installation, start the TPO program by clicking Start, All Programs, PTP Software, The Professional Office and The Professional Office. You will then be asked to 'locate database files'. Use the browse feature to locate the data directory F:\Data in our example and click OK.

Once the 30 day free trial has come to an end you must follow the instructions in the registration section above.

PTP Company Car Planner, CGT Planner and IHT Planner

The installation routine is the same for all the following products:

- PTP Company Car Planner
- PTP CGT Planner
- PTP IHT Planner

Each product listed has a separate installation i.e. if you want to install PTP Company Car Planner and PTP CGT Planner you would first need to select PTP Company Car Planner and install it, then select PTP CGT Planner and install that separately.

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the **Product Name link** on the Software Downloads webpage
- Select the "**Product Name Installation**" link and follow the installation wizard
- After the installation open the program and enter your registration details

Detailed guide

Please note the installation will differ depending on whether the program has been installed on the workstation before. The following notes have therefore been split into All Users, Existing users and New users as appropriate.



Important note: You must have administrative access rights to install the PTP programs. If you do not have the necessary access rights you will need to seek assistance from your own IT support.

All users

Having programs open during the installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

The programs are supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose the name of the product you wish to install, and then select the "Installation" link. You can then follow the on screen Installation Wizard.

New users

The Installation Wizard guides you through the process to make it as easy as possible. There are however some points to note. The Installation Wizard will ask you for the destination folder in which to install the program and then a database folder for the database files. We strongly recommend that you install to the default location. If you are installing the network level software please see the notes below.

Please note: Depending on what files your system already contains, Microsoft Windows may require you to re-boot.

After installing, please register your software from one workstation.

Existing users

Following on from the All users section above, The Installation Wizard guides you through the rest of the process. The software will install in the same way as the previous updates/service packs. You will only need to install the software on one workstation in a network and the new software will then automatically update each workstation as the user runs the program. After installing, please register your software from one workstation.

Registration

To start the programs click Start, All Programs, PTP Software, and select the program from the list. To register click Tools, Register and enter the details from your Registration Document.



Important note: It is important that you keep the registration document.

Installing on a network: New user (Existing users see above)

Quick guide

- The program(s) need(s) to be installed on each workstation
- The database files need to be installed to a shared area on the server
- The program(s) need(s) to be registered on one workstation

Detailed guide

The program(s) work(s) on both Peer to Peer and dedicated file server networks. Whatever system is in use all users must have permanent **READ** and **WRITE** access to the folder that will contain the data files. When running the Installation Wizard, you will be asked for the destination folder in which to install the program. We recommend that this be left as the default as the program should be on the local drive of each workstation.

You will then be asked for the path to the database folder for the database files. Enter the path to the folder on the server where you wish the database files to be located. We would recommend

- For PTP Company Car Planner

F:\PTPData\Company Car

- For PTP CGT Planner

F:\PTPData\CGT

- For PTP IHT Planner

F:\PTPData\IHT

Where F is the drive letter assigned to the server.

If you are running a Peer to Peer network you will need to map a drive letter (F in our example) to **\\Example\C\Program Files\<<Program Folder>>** (assuming the database files have been installed to the default location on the acting server)*. Here, **Example** is the name of the computer on the network acting as a server, and Program Folder will be:

- For PTP Company Car Planner

Company Car

- For PTP CGT Planner

CGT

- For PTP IHT Planner

IHT

The path to the database from the client workstations would then be:

- For PTP Company Car Planner

F:\Databases\CCP.mdb

- For PTP CGT Planner

F:\Database\CGT.mdb

- For PTP IHT Planner

F:\Database\IHT.mdb

Once the program has been installed on the master machine, you must follow the instructions in the registration section above. You will need to install the program on each workstation within a network system however, you only need to register the software from one workstation.

PTP Spreadsheet Planners (Including Incorporation, Tax Credits and Dividend v Salary)

The PTP Spreadsheet Planners consist of:

- PTP Incorporation Planner
- PTP Tax Credits Planner
- PTP Dividend v Salary Planner

Please note: You do not need to have purchased all three products as each will run independently of the others.

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**PTP Spreadsheet Planners**” link on the Software Downloads webpage
- Select the “**PTP Spreadsheet Planners Installation**” link and follow the installation wizard
- After the installation open the PTP Spreadsheet Planners program and enter your registration details

Detailed guide

Please note: The installation will differ depending on whether the program has been installed on the workstation before. The following notes have therefore been split into All Users, Existing users and New users as appropriate.



Important note: You must have administrative access rights to install the PTP programs. If you do not have the necessary access rights you will need to seek assistance from your own IT support.

All users

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed before you start.

The PTP Spreadsheet Planners are supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **PTP Spreadsheet Planners**, and then select the “**PTP Spreadsheet Planners Installation**” link. You can then follow the on screen Installation Wizard.

New users

The Installation Wizard guides you through the process to make it as easy as possible. There are however some points to note.

The Installation Wizard will ask you for the destination folder in which to install the program. We strongly recommend that you install to the default location. If you are installing the network level software please see the notes below.

Please note: Depending on what files your system already contains, Microsoft Windows may require you to re-boot.

After installing, please register your software.

Existing users

Following on from the All users section above, the Installation Wizard will guide you through the rest of the process. The software will install in the same way as the previous updates/service packs. You will need to install the software on each workstation in a network version separately, please see the network installation notes below. After installing, please register your software on each workstation.

Registration

To start PTP Spreadsheet Planners click Start, All Programs, PTP Software, Spreadsheets, PTP Spreadsheet Planners. Depending on your security settings, you may be asked if you wish to Disable or Enable Macros, select Enable. To register click the Register button in the opening window, and enter the details from your Registration Document. If you have difficulty entering your registration details see Troubleshooting below.



Important note: It is important that you keep the registration document.

Installing on a network

PTP Spreadsheet Planners should be installed on each workstation. It is possible when saving new records to choose where to save the files. It is therefore possible to save the files to a shared network drive. Click on File, Save As and the choice is provided on the next screen.

PTP Tax Fast 8

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**PTP Tax Fast 8**” link on the Software Downloads webpage
- Select the “**PTP Tax Fast 8 Installation**” link and follow the installation wizard
- After the installation open the PTP Tax Fast 8 program and enter your registration details

Detailed guide

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

PTP Tax Fast 8 is supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **PTP Tax Fast 8**, and then select the “**PTP Tax Fast 8 Installation**” link. You can then follow the on screen Installation Wizard.

Registration

To start PTP Tax Fast 8, click Start, All Programs, PTP Software, PTP Tax Fast 8. To register select Options, then Licence Key and a box will appear. Enter the details as shown on your registration document and click OK. Close and re-enter the program.

Installing on a network

PTP Tax Fast 8 should be installed on each workstation. It is possible when saving new records to choose where to save the data files. It is therefore possible to save the files to a shared network drive. Click on File, Save and the choice is provided on the next screen.

PTP Tax Data

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**PTP Tax Data**” link on the Software Downloads webpage
- Select the “**PTP Tax Data Installation**” link and follow the installation wizard
- After the installation open the PTP Tax Data program and enter your registration details

Detailed guide

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed before you start.

PTP Tax Data is supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **PTP Tax Data**, and then select the “**PTP Tax Data Installation**” link. You can then follow the on screen Installation Wizard.

Registration

To start PTP Tax Data click Start, All Programs, PTP Software, PTP Tax Data. To register select Options, then Licence Key and a box will appear. Enter the details as shown on your registration document and click OK. Close and re-open the program.

Installing on a network

Quick guide

- The program needs to be installed on each workstation
- The database files need to be moved to a shared area on the server
- The program on each workstation needs to be told to look for the data on the server • The program needs to be registered on each workstation

Detailed guide

The program works on both Peer to Peer and dedicated file server networks. Whatever system is in use all users must have permanent **READ** and **WRITE** access to the folder that will contain the data files.

When running the Installation Wizard, you will be asked for the destination folder in which to install the program. We would recommend this be left as the default as the program should be on the local drive of each workstation.

If a dedicated file server is being used create an appropriately named folder on the server. We would recommend **F:\PTPData\TaxData** where F is the drive letter assigned to the server. Copy the database file **taxdata3.mdb** from a workstation into the newly created folder on the server.

If you are running a Peer to Peer network you will need to map a drive letter (F in our example) to **\\Example\C\Program Files\PTP-SW** (assuming the program has been installed to the default location on the acting server). Here **Example** is the name of the computer on the network acting as a server.

The database file **taxdata3.mdb** should be removed from each workstation and should only exist on the server. The first time PTP Tax Data is run on each workstation a message box will request the database file path. The path to the server via the network drive name should be entered i.e.

F:\PTPData\TaxData\taxdata3.mdb if **F:\PTPData\TaxData** is the network drive and directory/folder. You must then register each workstation separately.

The administrator should keep a separate copy of the **taxdata.mdb** files and use the 'Write enable' option to make changes and replace the server version with it.

PTP Professional Tax Archive

PTP Professional Tax Archive is supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose PTP Professional Tax Archive, and then select the Full, Upgrade or Monthly Update link as appropriate. You can then follow the on screen Installation Wizard.

Please note: PTP Professional Tax Archive requires a network drive to be mapped. It will not be possible to run the program over a network without a mapped network drive letter. If you are in any doubt please contact your network administrator.

Forms Online

Quick guide

- Visit our download webpage www.ptpsoftware.co.uk/getmysoftware
- Select the “**Forms Online**” link on the Software Downloads webpage
- Select the “**Forms Online Installation**” link and follow the installation wizard
- After the installation open the Forms Online program and enter your registration details

Detailed guide

Having programs open during the installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.



Important note: If you are a user of PC Share Register Plus then Forms Online will already have been installed as a subsidiary module and you do not need to install it separately. To access it open PC Share Register Plus and select Other Modules, Forms Online.

Forms Online is supplied via a download page on the PTP Software website, www.ptpsoftware.co.uk/getmysoftware. From the list of programs on the page choose **Forms Online**, and then select the “**Forms Online Installation**” link. You can then follow the on screen Installation Wizard.

The Installation Wizard will ask you the type of installation you require. If you are installing for the first time or as an update, select **Complete/Update**. The Wizard will then guide you through the rest of the installation process.

Registration

To start Forms Online click Start, All Programs, Forms Online and Forms Online. To licence your software, click on File and Subscription Details and enter the information EXACTLY as shown on the Licence Details document. Click OK and exit then re-start the program.



Important note: It is important that you keep the registration document.

Installing on a network

Quick guide

- The program needs to be installed on the server
- The installation needs to be run on each workstation selecting Network Workstation as the installation type
- The program needs to be registered on one workstation

Detailed guide

Forms Online is a server-based application. You must therefore install Forms Online on a network server in the same way as you would on a standalone system. You can then run the installation on each workstation and select the Network Workstation option when asked to select the installation type. This will create a shortcut on the local workstation.



Important note: Forms Online requires a network drive to be mapped. It will not be possible to run the program over a network without a mapped network drive letter. If you are in any doubt please contact your network administrator.

Troubleshooting

- Transferring forward within the PTP Tax Platform is only possible if the program has been registered. If you are unable to select which program to transfer forward then the program has not been registered successfully
- If you are not able to enter your registration details in the PTP Spreadsheet Planners it may be because the security level in Microsoft Excel is set too high. The spreadsheets contain macros that must be running for the program(s) to work correctly. If you are asked whether you want to enable macros, choose yes. If you are not asked you will need to change the security level from High to Medium via Tools, Macros, Security
- PTP Tax Fast 8 and PTP Tax Data are not Windows Vista or Windows 7 compliant.
- When installing a product on a Microsoft Windows Vista Machine a User Access Control message box may be displayed, Click Continue to proceed.